

Overview of Effective Dating

Effective dating enables the ability to keep historical, current, and future-dated information and provides the ability to update existing information without losing or overwriting the data already in Cardinal.

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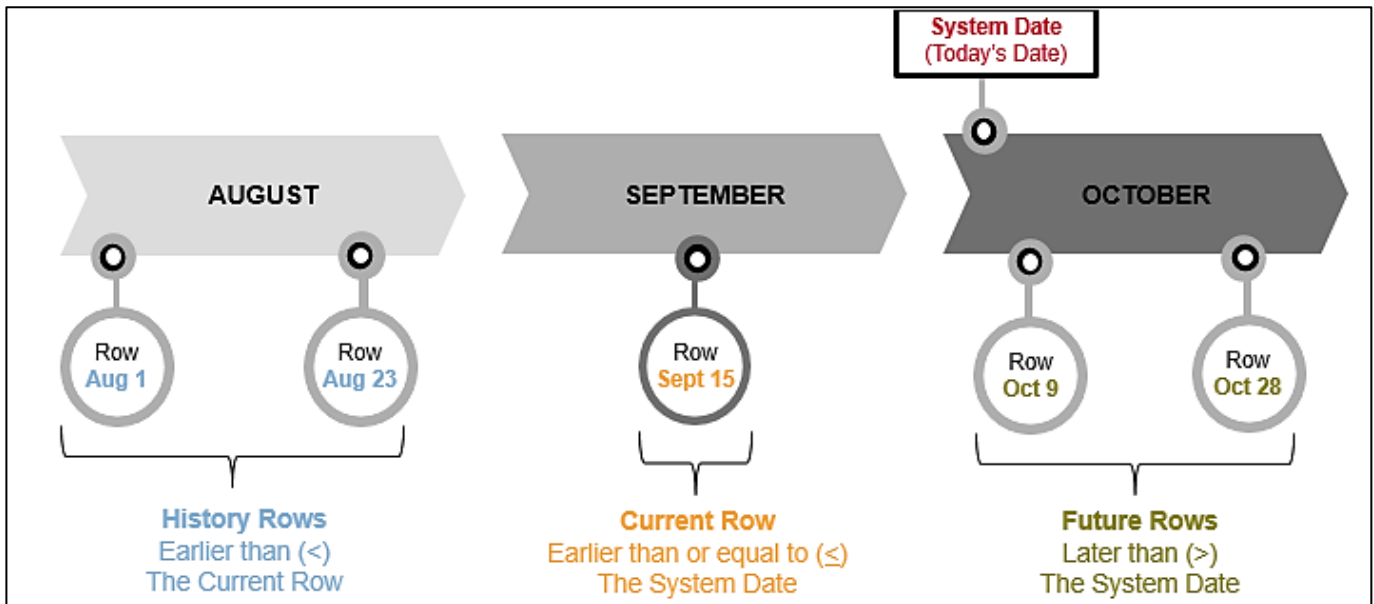
It is imperative to retain existing data in the database when entering new information related to existing data, (e.g., incumbent position transfer, pay rate change). To retain history, insert an effective date, which is a data row identified by a date that indicates when the new information goes into effect.

Effective dating provides the ability to store historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

The following table provides high-level overview information for each type of effective dating row:

Types of Effective Dated Rows	Criteria	Number of Rows Allowed	View Access	Update Access	Insert Access
History	Effective Date < Effective Date of the Current Row	Zero to Many	Yes	No	No
Current	Effective Date ≤ Today's Date	One	Yes	No	Yes
Future	Effective Date > Today's Date	Zero to Many	Yes	Yes	Yes

The following diagram displays an example of history, current, and future effective dates:

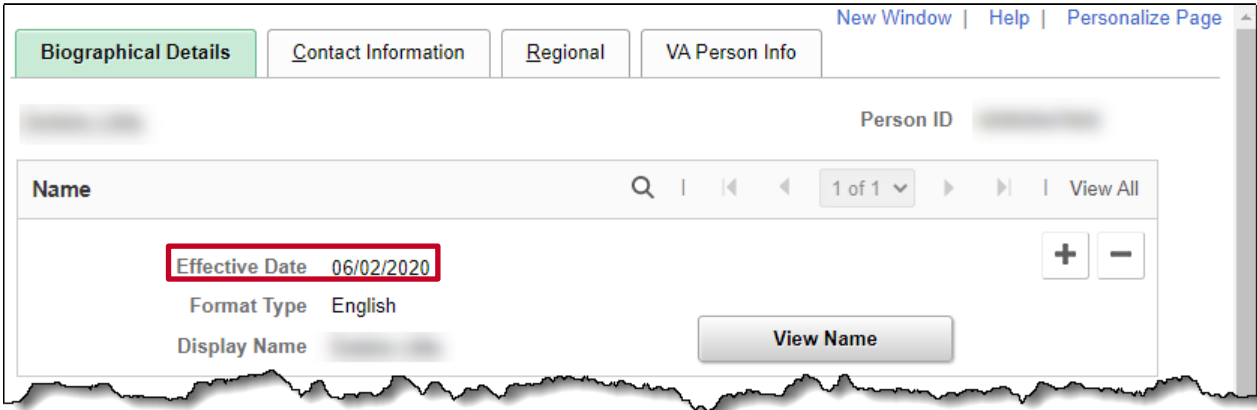


Tips: Multiple actions with the same effective date on the employee's job record are handled by using the effective sequence field found on the **Work Location** tab on the **Job Data** page to differentiate actions with the same effective date. The record row with the lowest number becomes a historical row of data when a new sequence is added.

Overview of Effective Dating

Example of how the Personal Record and the Job Record Effective Dates impact each other:

The effective date of the hire on the Job Record cannot occur earlier than the effective date on the Personal Data Record.



Biographical Details | Contact Information | Regional | VA Person Info

Person ID [REDACTED]

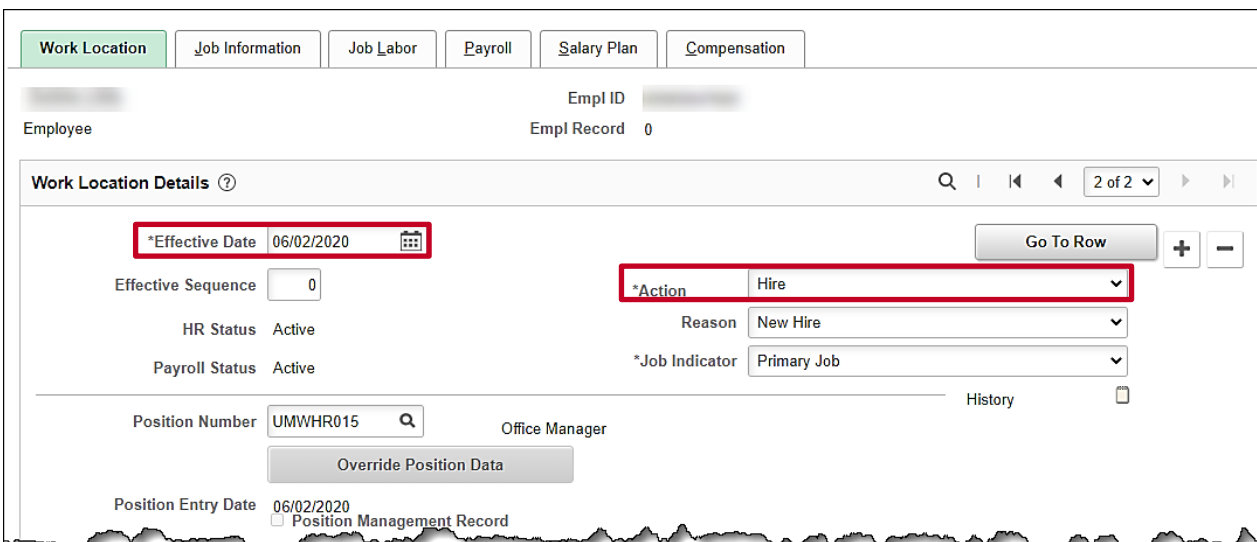
Name [REDACTED] 1 of 1 View All

Effective Date 06/02/2020

Format Type English

Display Name [REDACTED] View Name

Note: In this example, the Personal Data Effective Date is 06/02/2020.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Empl ID [REDACTED]

Employee Empl Record 0

Work Location Details 2 of 2

***Effective Date** 06/02/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

***Action** Hire

Reason New Hire

*Job Indicator Primary Job

Position Number UMWHR015 Office Manager

Override Position Data

Position Entry Date 06/02/2020 Position Management Record

Note: In this example, the Job Record Effective Date of Hire is 6/02/2020. The Job Record Effective Date must occur on or later than the date of the Personal Data Effective Date.



Work Location Details 1 of 2

***Effective Date** 12/02/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

***Action** Pay Rate Change

Reason Competitive Salary Offer

*Job Indicator Secondary Job

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Note: The effective date of any Job Record modifications must occur on or later than the effective date of the current Job Record Effective Date. Contact DHRM if there is a requirement to insert a transaction prior to the current Job Record Effective Date.

Example of how the Position and Job Record Effective Dates impact each other:

Position Number DOA00008		Review Date	
Headcount Status Filled		Position Months 12.00	
Current Head Count 1 of 1		Stmnt of Economic Interest Req'd No	
Effective Date 01/01/1901		VPA Covered No	
Effective Sequence 0			
Reason NEW New Position			
Approval Status Approved			

Note: The Position Effective Date is 01/01/1901.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
Empl ID [REDACTED]					
Employee [REDACTED] Empl Record 0					
Work Location Details ?					
*Effective Date 11/09/2019					
Effective Sequence	0	*Action	Data Change	Go To Row + -	
HR Status	Active	Reason	Conversion		
Payroll Status	Active	*Job Indicator	Primary Job		
Position Number	DOA00008	Accountant		Current	<input type="checkbox"/>
Override Position Data					

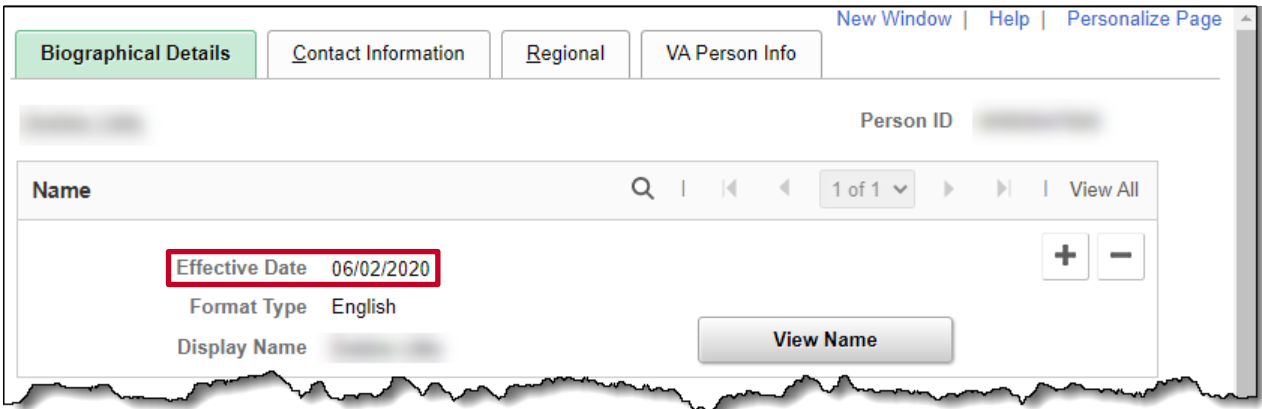
Note: The incumbent employee's Job Data Effective Date must be on or later than the Position Effective Date.

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Example of how the Personal, Job, and Benefit Record Effective Dates impact each other:

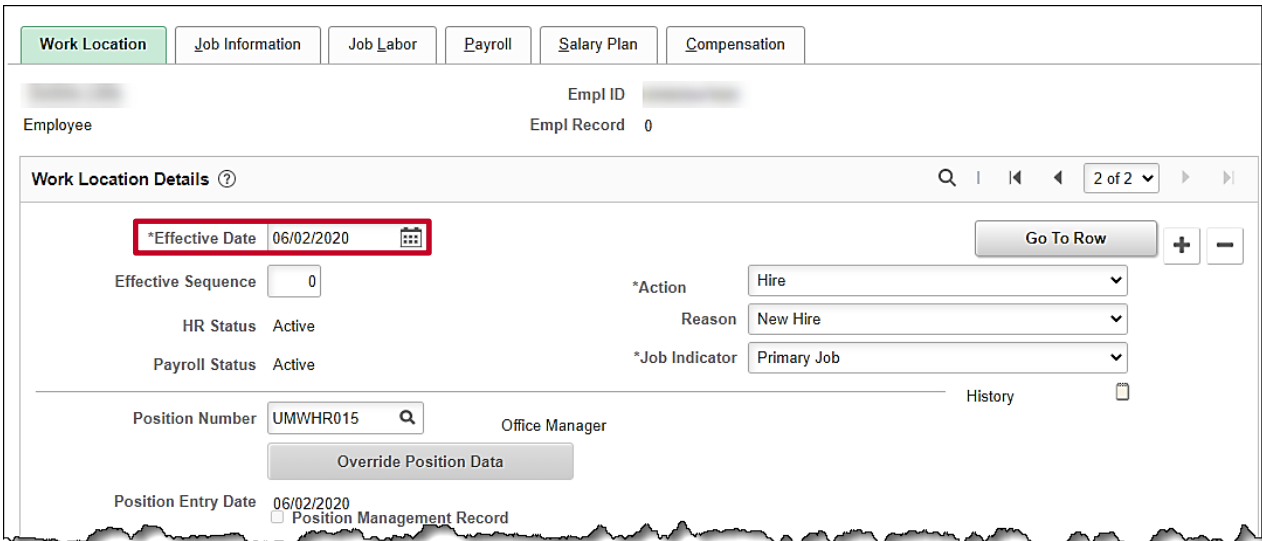
The current active row on the effective dated tables is the row with the most recent effective date less than or equal to the current date.

- Agencies must submit a help desk ticket to the Cardinal Post Production Support (PPS) team to update current rows and history rows.
- Agencies can enter new rows with effective dates greater than the most current row, including future-dated rows.



The screenshot shows the 'Biographical Details' tab selected. The 'Effective Date' field is highlighted with a red box and contains the value '06/02/2020'. Other visible fields include 'Format Type' set to 'English' and a 'Display Name' field. A 'View Name' button is located to the right of the 'Display Name' field. The top navigation bar includes links for 'New Window', 'Help', and 'Personalize Page'.

Note: In this example, the Personal Data Effective Date is 06/02/2020.



The screenshot shows the 'Work Location' tab selected. The '*Effective Date' field is highlighted with a red box and contains the value '06/02/2020'. Other visible fields include 'Effective Sequence' set to '0', 'HR Status' set to 'Active', 'Payroll Status' set to 'Active', '*Action' set to 'Hire', 'Reason' set to 'New Hire', and '*Job Indicator' set to 'Primary Job'. The 'Position Number' field contains 'UMWHR015'. The 'Position Entry Date' is '06/02/2020'. The top navigation bar includes links for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'.

Note: In this example, the Job Record Effective Date of Hire is 6/02/2020. The Job Record Effective Date must occur on or later than the date of the Personal Data information.

Overview of Effective Dating

Benefit Program Participation Details ⓘ

Effective Date 06/02/2020 ⓘ

Currency Code USD

+ -

*Benefit Program WGE ⓘ

Wage Employee No Benefits

Note: In this example, the Benefit Program Participation Effective Date is 06/02/2020. The Benefit Program Participation Effective Date must occur on or later than the Job Record Effective Date of Hire.